



CONeX Guide to Initiating and Facilitating Case Conferences

General Principles and Purpose of Case Conferences

- Developing a “*team*” for the family and youth. Families and youth feel more supported when they know their team is communicating and working together and when they feel their voice is a key part in all decision making.
- Developing a sense of “*shared responsibility*” –no one system or agency is solely responsible for a complex child/family. In order to meet the complex needs of these children/youth and families, systems need to collaborate and work innovatively together.
- Gaps in service can more readily be identified when professionals and families come together to share updates and progress across all environments.
- Families and children/youth feel heard when they can share directly with their team what they need. The case conference becomes an “*intervention*” in and of itself, helping the family feel empowered, supported and deserving of ongoing support from their team. The case conference model enables families to know that they are not alone and to identify who they can reach out to prevent, mitigate and resolve any crisis or challenging situation.
- Natural supports (as identified by the family) should be included in case conferences as appropriate, providing another foundation of support for the family.

Who Should Attend?

- The case coordinator should speak to the child/youth and family, asking them who their supports are across all Partner Systems (Health, Education, Children’s Services, Community, Social and Support Services), Community Agencies (Woods, Hull, McMan, Aspen, SCOPE, etc.) and Natural Supports (other family members, friends, neighbors, previously involved professionals). Describe that you will be helping to pull together the family’s “*team*” to create a multidisciplinary support system for the family.
- Ensure that the case coordinator is receiving written consent from parents/guardians to share information across Partner Systems and team members (see consent handout for example).
- It is important to note that not all professionals will be able to attend every case conference. It is recommended to provide options to attend in person and over the phone. It is also recommended that the case coordinator seek input/updates from parties unable to attend the case conference prior to the meeting so the case coordinator can provide updates on that team member’s behalf.
- The case coordinator has the responsibility of taking notes during all case conferences. It is important to highlight any and all action items to be taken by each team member within the notes. These notes are then distributed to the team in an encrypted or password protected email. Parents can provide verbal and/or written consent for this process. See Case Conference Summary Template for a template for the notes.



- Whenever possible, parents and the child/youth should be directly involved in their case conferences. Professional only meetings can occur but should only occur rarely. It is important for the family and the child/youth to have their voices heard and to provide valuable information about the home environment.

Case Conference Invitations

- The case coordinator is responsible for organizing and facilitating all case conferences.
- The case coordinator will choose a date for the case conference that works for everyone and will invite the child/youth, family, natural supports, and all professional team members.
- Often, case conferences are held at the child/youth’s school at the request of the case coordinator as hosting the case conference in the school setting makes it easier for school-based team members to attend.
- Once a time, date and location have been determined and a meeting space has been booked, invitations are sent out through email/calendar invitation. Below is a template for a case conference invitation email.

Hello everyone,

I hope you’re all doing well and having a good week. In follow-up to our recent conversations, I would like to book a multidisciplinary case conference on _____ (date) from _____ (time, recommended 1.5hours) at _____ (location, recommended at child/youth’s school).

The aim of this meeting will be to collaborate together to ensure client’s safety, health, mental health and educational needs are met on an ongoing basis across home, school and community settings.

If you are unable to attend in person, please feel free to attend over the phone using the Case Conference Line. To access the case conference line, please dial _____ (case conference line number).

Thank you for all of the work you do to support client and his/her family. I look forward to connecting with you all on _____ (date).

Sincerely,

_____ (name), Case Coordinator for _____ (client).

- Please remember to include all relevant supports in the case conference invitation. It can be helpful to reach out to any physicians/pediatricians/psychiatrists involved as they often appreciate knowing there is a meeting even if they can’t attend and they may have relevant updates to provide prior to the case conference. It can also be helpful to call professionals directly to explain your role and the purpose of calling the meeting.
- Note that we try to use initials when speaking about children/youth and families via email to protect confidentiality.





Day of the Case Conference – Running the Meeting

- It is often helpful to send a meeting agenda outline to all team members the day of or the day before the case conference. An example of an agenda is outlined below.

Good morning everyone,

I'm looking forward to seeing you all today at _____ (location) today at _____ (time) for client's case conference. I wanted to send a meeting agenda to each of our outlining what I am hoping to cover in today's meeting. If you have items to add, please feel free.

Introductions:

Introducing all team members and their respective roles

Safety Needs and Planning:

Safety planning

- Update on safety concerns in home, school and community settings
- Continual updates to existing safety plan

Children's Services update

- Update on safety concerns in home, school and community settings
- Continual Child protection concerns

Medical/Mental Health Status and Planning:

Medical update

- Physical health
- Medical appointments

Mental health update

- Mental health – diagnoses and medications
- Next appointments
- Linking physician/psychiatry with the team

Academic / School Status and Planning:





Areas of Strength

- What is working well (academics, behavior, etc)

Areas of Struggle

- What is challenging in the school setting (academics, behavior, etc)

Collaboration

- Linking school with pediatrician/physician

Home / Community-Based Supports:

Areas of Strength

- What is working well

Areas of Struggle

- What is challenging in the home setting

Additional needed supports

- What other supports are needed to promote healthy family functioning

FSCD Update

- Respite
- Community Aids
- Behavior Developmental Aids

Community Services Updates

- Any other agency that is involved (Woods, Hull, McMan, Aspen, Boys and Girls club, SCOPE etc)
- What services are they providing and for how long

Next Steps:

- Identify next steps and tasks for all team members
- Set next case conference at the current meeting with all players (4-6 weeks from now)





Just a reminder that if you aren't able to attend in-person today, you are welcome to call in using the case conference line by dialing _____ (conference line number). Thank you and I look forward to connecting with you soon.

Sincerely,

_____ (name), Case Coordinator for _____ (client)

- The case coordinator is responsible to guide the team through the agenda for the meeting. It is helpful to be aware of time management as all relevant updates and concerns will need to be shared within the time limit you have set for the meeting
- The case coordinator is responsible to take notes during each case conference and distribute the notes to the team in a password protected document and/or through encrypted email. Please see Case Conference Summary Notes handout for a template of case conference notes. *Note – it is important to compile a list of action items assigned to each team member in the “Next Steps” section of your notes to promote accountability and follow-through prior to your next case conference
- Remember to book the next case conference while you have all team members present with you. Case conferences are typically booked once every 4-6 weeks with the expectation that all “next steps” items will be complete prior to the next meeting if at all possible

Troubleshooting

- If you run into trouble or can't reach a professional or don't know the service which the family is involved with, contact your Manager or Allison Warga (AHS Network Liaison) for navigation support.
- Important: help the team and parents to know that you will not be able to coordinate on the long-term and that your role is to connect professionals and families better so that everyone can communicate and collaborate together as issues arise.
- It is also important to remember that some Conferences will go smoothly and some will not. The part to remember is the more we are able to communicate and collaborate together with the child and family the more likely we are to see a positive outcome.
- Ask for support from your supervisor or manager as needed.
- You are welcome to contact Katie Pelletier (CONeX Team Lead; 403-554-1876 or Katie.pelletier@ahs.ca) for consultative support from CONeX if you have questions throughout the process of initiating and running a case conference.

